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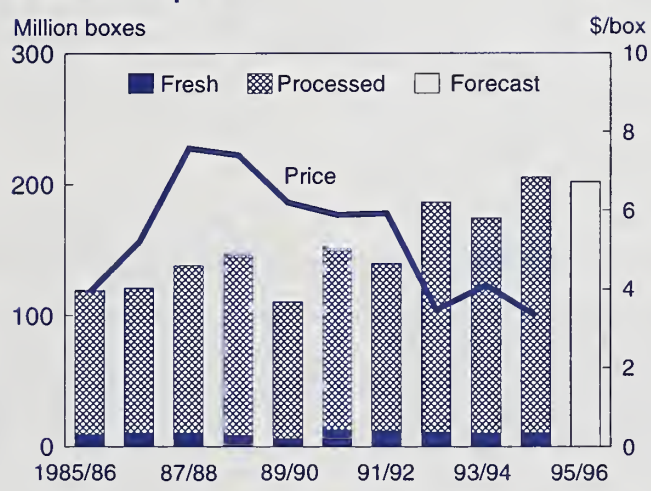
FTS-275  
November 1995

# Fruit and Tree Nuts

## Situation and Outlook Report

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Florida orange production, use,  
and on-tree price





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## Summary

Smaller crops and larger exports of most fruit should boost grower prices in 1995/96. Production is expected to be lower for Florida processing oranges, all grapefruits, apples, pears, almonds, and walnuts. Larger crops are expected for fresh market oranges, lemons, avocados, cranberries, pecans, and hazelnuts.

Total U.S. citrus production is forecast at 16.0 million short tons in 1995/96. While production is expected to increase less than 1 percent from the 1994/95 crop, it would be 10 percent above 1993/94 and the largest crop since the record 16.5 million short tons in 1979/80.

U.S. orange juice production is forecast at 1.3 billion gallons (single-strength equivalent) in 1995/96, slightly higher than a year ago. A smaller Florida orange crop is expected to be offset by higher juice yields. Relatively low beginning stocks, together with the lower Florida Valencia orange crop, will support prices and encourage increased imports this coming year.

The California orange crop is expected up 8 percent in 1995/96. Despite a larger crop this year, prices are expected to increase for fresh oranges supported by strong export demand.

Grapefruit production in 1995/96 is expected to decline from the 1994/95 record. Total production is expected to reach 2.8 million short tons, a 3-percent decline. Florida's crop, which accounts for over 80 percent of U.S. grapefruit production, is down 3 percent to 2.3 million tons. The decline is attributed to smaller-sized grapefruit and lighter fruit set than last year. In 1995/96, slightly lower production along with higher exports should boost grower prices above last year's low level.

USDA expects the 1995/96 lemon crop to increase 14 percent to 1.045 million tons. The larger 1995/96 crop should put downward pressure on prices, boosting domestic consumption and exports.

Reduced apple production in Washington and California brought the final 1995 forecast down 2 percent from 1994's record crop. Ideal growing conditions in Michigan, along with relatively favorable weather in the Eastern States resulted in larger 1995 apple crops in Michigan, New York, and Pennsylvania. The decline in U.S. apple production in 1995, along with high quality fruits, and prospects of continued strong domestic and export demand have supported apple prices.

The final pear forecast for 1995 was down 8 percent from 1994 because of excessive moisture and hail in California. The Washington crop was up slightly. Tighter domestic

supplies in 1995/96 will help boost grower prices for fresh market pears.

U.S. grape production in 1995 is expected to be down 2 percent from last year, reflecting smaller crops in California, New York, Pennsylvania, and Arizona. Larger crops are expected in Washington, Michigan, Oregon, Ohio, Arkansas, Georgia, and North Carolina.

The final 1995 U.S. peach crop forecast was down fractionally from 1994. Stormy weather and hail this spring in California contributed to the decline. The smaller U.S. peach crop helped boost prices. With lower processing supplies this year, processors also paid higher prices for canning peaches.

USDA's July forecast for the 1995 U.S. strawberry crop was down 7 percent from last year. Lower yields in California reduced production. Output in Oregon and Washington was also down. Florida's winter crop was almost unchanged from the previous year. Lower yields in Florida, relative to 1994, were nearly offset by an increase in area harvested. Both fresh and processed uses in 1995 declined from 1994 because of reduced production. The smaller 1995 crop helped strengthen fresh strawberry prices. Strawberry processing declined this year due to higher prices for fresh strawberries and lower production. Also, ample stocks of frozen strawberries from 1994's large crop resulted in a relatively sluggish demand and lower prices for processing strawberries in 1995.

Given favorable growing conditions, California's avocado harvest in 1995/96 is expected to be about 10 to 20 percent larger than the 1994/95 crop, and the highest since 1992/93. Florida's avocado production is also expected to be higher. With the larger crop, imports are likely to decline while exports will continue strong.

While U.S. cranberry production is expected to be up only 1 percent over a year ago, it could set a new record. Higher output in Wisconsin is expected to offset declines in Massachusetts, Oregon, and Michigan. A drought in Massachusetts, hail in Oregon, and a very wet spring in Washington, hampered production. The average price growers receive for cranberries may be slightly higher in 1995. Contract prices were supported by increased demand for processing cranberries as the number of handlers and processors rose.

Tree nut prices, except for hazelnuts, are expected higher for 1995. California's almond and walnut crops are expected to fall. Oregon's hazelnut production is forecast up 80 percent. Lower beginning stocks and imports are expected to offset higher pecan output.



## Fruit Price Outlook

### Higher Grower Prices for Most Noncitrus Crops in 1995/96

The grower price index for fruit and nuts moved above the year earlier level in May 1995, and continued higher through September, reflecting higher prices for fresh-market oranges, fresh lemons, apples, pears, peaches, and strawberries. Larger 1994/95 crops of oranges, grapefruits, grapes, and a lower season-average grower price for almonds, limited the increase in the grower price index.

Meanwhile, the consumer price index (CPI) for fresh fruit from January through September 1995 averaged 8 percent above a year earlier. Contributing to the increase were higher retail prices for fresh oranges, grapefruits, Red Delicious apples, lemons, peaches, grapes, strawberries, and bananas. Despite ample supplies of canned and frozen fruit, good demand, especially in the export market, increased the CPI for processed fruit 3 percent above 1994's January through September average.

Tighter supplies of apples, pears, and grapes following the 1995 fall harvest and expectations of smaller 1995/96 crops of grapefruit, Florida temples, and tangelos will help support grower prices in 1995/96. Grower prices for lemons and tangerines may decline because of expected larger crops in 1995/96. Although another large crop is expected for fresh market oranges, continued high export demand could boost prices even higher this year. The 1996 grower prices for almonds, pistachios, pecans, walnuts, and macadamia nuts will receive support from expected tight domestic supplies in 1995/96, while ample supplies will pressure hazelnut prices down.

Table 1--Index of prices received by growers for fruit and nuts, 1991-95

Month	1991	1992	1993	1994	1995
1990-92=100					
January	97	105	72	80	73
February	101	106	72	82	72
March	107	109	69	86	77
April	111	104	73	90	81
May	116	98	81	94	98
June	134	100	97	94	99
July	112	92	102	97	105
August	112	102	113	100	113
September	123	101	120	102	111
October	116	96	119	97	
November	111	92	105	81	
December	104	80	85	71	
Annual	112	99	92	90	

Source: National Agricultural Statistics Service, USDA.

Table 2--U.S. monthly consumer fruit price indexes, 1993-95

Month	Fresh fruit			Processed fruit		
	1993	1994	1995	1993	1994	1995
-- 1982-84=100--						
January	191	207	214	133	135	134
February	187	195	213	135	133	135
March	184	199	207	132	133	137
April	185	198	210	132	134	137
May	188	204	216	131	133	138
June	176	193	218	130	133	137
July	179	200	218	131	134	138
August	185	202	222	132	132	139
September	193	204	231	132	132	138
October	198	199		133	133	
November	194	200		133	133	
December	205	213		134	133	
-- 1982-84=100--						
Frozen fruit and juice			Canned and dried fruit			
	1993	1994	1995	1993	1994	1995
January	133	134	134	132	134	135
February	135	132	135	132	133	135
March	132	133	137	132	134	135
April	132	133	137	132	134	136
May	129	131	136	133	135	136
June	128	132	137	134	135	136
July	130	133	137	134	135	138
August	131	131	139	135	136	139
September	132	132	137	132	133	139
October	132	132		133	135	
November	133	132		132	133	
December	133	133		133	134	

Source: Bureau of Labor Statistics, U.S. Department of Labor.

## Citrus Fruit Outlook

### U.S. Citrus Crop Slightly Higher Than Last Year's Near Record Production

The 1994/95 U.S. citrus crop was the second largest on record. Production reached 16 million tons, 10 percent above 1993/94. Most of the increase was due to Florida's large orange and grapefruit crops. A combination of increased yields per acre and a 10-percent increase in orange bearing acreage gave Florida its second largest orange crop on record. Production was down for California and Arizona, but Texas production continued recovering from the 1989 freeze.

Total U.S. citrus production is forecast at 16.1 million short tons in 1995/96. While production is expected to increase less than 1 percent from the 1994/95 crop, it would be 10 percent above 1993/94 and the largest crop since 1979/80's record 16.5 million short tons.

Florida's citrus production is expected to be lower in 1995/96 compared with the previous year's near-record crop. Above-average rainfall created ideal growing conditions in the State and promoted new foliage growth on the

Table 3--U.S. monthly retail prices for selected fruits and juice, 1993-95

Month	Valencia oranges			Navel oranges			Orange juice, concentrate 1/			Grapefruit		
	1993	1994	1995	1993	1994	1995	1993	1994	1995	1993	1994	1995
	--Dollars per pound--			--Dollars per pound--			--Dollars per 16 fl. oz--			--Dollars per pound--		
January	--	--	--	0.514	0.505	0.575	1.677	1.674	1.583	0.518	0.473	0.45
February	--	--	--	.506	.496	.585	1.753	1.648	1.609	.505	.462	.448
March	--	--	--	.506	.520	.571	1.619	1.665	1.629	.495	.470	.443
April	--	--	--	.521	.549	.606	1.627	1.662	1.632	.468	.452	.458
May	--	--	--	.549	.618	.650	1.572	1.600	1.632	.447	.461	.476
June	.536	0.581	0.619	--	--	--	1.587	1.598	1.620	.475	.479	.578
July	.571	.591	.654	--	--	--	1.558	1.640	1.639	.529	.552	.629
August	.609	.606	.631	--	--	--	1.610	1.578	1.642	.611	.609	.677
September	.747	.584	.662	--	--	--	1.626	1.594	1.607	.628	.647	.709
October	.808	.573	--	--	--	--	1.615	1.574	--	.629	.586	--
November	--	--	--	.694	.578	--	1.643	1.550	--	.544	.488	--
December	--	--	--	.556	.552	--	1.672	1.549	--	.499	.473	--
	Lemons			Red Delicious apples			Bananas			Peaches		
	1993	1994	1995	1993	1994	1995	1993	1994	1995	1993	1994	1995
	--Dollars per pound--			--Dollars per pound--			--Dollars per pound--			--Dollars per pound--		
January	0.920	0.942	0.988	0.810	0.789	0.765	0.426	0.440	0.503	--	--	--
February	.868	.844	.962	.817	.810	.789	.475	.514	.496	1.201	1.21	1.356
March	.879	.838	.912	.802	.804	.793	.475	.500	.508	--	--	--
April	.901	.911	.966	.802	.803	.784	.483	.469	.485	--	--	--
May	.971	.961	.971	.815	.806	.813	.472	.469	.483	--	--	--
June	1.058	1.057	1.079	.835	.822	.833	.446	.447	.490	.959	.889	1.098
July	1.222	1.293	1.315	.854	.848	.864	.448	.452	.522	.829	.872	.892
August	1.291	1.450	1.401	.904	.881	.901	.422	.48	.512	.854	.857	.930
September	1.341	1.503	1.402	.939	.874	.923	.395	.453	.490	.899	.915	1.174
October	1.341	1.339	--	.850	.745	--	.405	.430	--	--	--	--
November	1.159	1.131	--	.798	.735	--	.404	.434	--	--	--	--
December	1.054	1.037	--	.778	.722	--	.414	.458	--	--	--	--
	Anjou pears			Thompson seedless grapes			Strawberries 2/					
	1993	1994	1995	1993	1994	1995	1993	1994	1995			
	--Dollars per pound--			--Dollars per pound--			--Dollars per 12-oz. pint--					
January	0.777	0.827	--	1.831	2.010	1.747	--	--	--			
February	.805	.815	0.774	1.480	1.378	1.580	1.467	1.318	1.926			
March	.855	.790	--	1.330	1.331	1.336	1.206	1.262	1.340			
April	.866	.773	--	1.467	1.295	1.622	.908	.910	1.001			
May	.881	.736	--	--	1.723	1.972	.874	.983	1.140			
June	.933	.783	--	1.406	1.424	1.549	1.066	1.047	1.180			
July	--	.858	--	1.338	1.412	1.460	1.013	1.085	1.209			
August	--	--	--	1.210	1.148	1.300	1.069	1.108	1.398			
September	--	--	--	1.179	1.136	1.160	1.151	1.209	1.355			
October	--	--	--	1.310	1.340	--	1.261	1.286	--			
November	--	--	--	1.601	1.735	--	--	--	--			
December	.891	--	--	--	2.134	--	--	--	--			

-- = Insufficient marketing to establish price.

1/ Data converted from 12 fluid ounce containers.

2/ Dry pint.

Source: Bureau of Labor Statistics, U.S. Department of Labor.

trees. However, lighter fruit set per tree for all varieties decreased the expected output. Florida's orange and grapefruit crops, which account for about 97 percent of the State's citrus production, are expected to be down 2 and 3 percent, respectively. Larger declines are expected for tangelo and temple crops. Only tangerine production is expected to increase in 1995/96, by 16 percent over last year.

In California, production is expected to total 3.7 million short tons this year, up 6 percent from the previous year. Orange and lemon production, which account for about 90 percent of the State's citrus crop, are expected to increase by 8 and 7 percent respectively from last year. The crops' quality was reported to be good. Grapefruit production is expected to fall 9 percent. Excessive heat has quickened the rate of maturity, and California began harvesting its grapefruit earlier than normal in 1995/96. The set is down significantly from last year, but individual fruit size is large.

Arizona's orange production is expected to increase by 8 percent. Lemon production is expected to rise by 53 percent for 1995/96. Texas citrus production is expected to continue increasing. Despite problems from citrus leaf minor in the Rio Grande Valley, trees remain in good condition. September rains helped alleviate some of the summer's dry weather. Grapefruit production is forecast at

1 percent above last year and 57 percent above 2 years ago. New acreage coming into production contributes to the State's increases. If Texas' grapefruit crop forecast is realized, it will account for about 7 percent of the U.S. crop.

The large 1994/95 crop lowered grower prices for most citrus crops except lemons and tangerines. U.S. orange prices (on tree) were down 15 percent and grapefruit prices were down 37 percent from the year before. Lemon and tangerine prices rose, however, by 17 and 23 percent, respectively. Despite the pressure on prices due to the large citrus crop this year, strong export demand for California oranges, lower Florida frozen concentrate orange juice inventories, and a drop in the Florida Valencia orange crop, should boost prices.

### **Orange Juice Supply Is Tighter, Despite High Output**

The U.S. orange crop is forecast at 11.7 million short tons, less than 1 percent above last year's near-record crop, but 13 percent above 2 years ago. Production is expected to be down about 2 percent in Florida, the major orange juice producer, but up in California, Arizona, and Texas. Although down from a year ago, Florida's production is still expected to be large due to good growing conditions. Above average rainfall in Florida promoted new foliage

Table 4--Citrus fruit: Utilized production by crop, State and United States, 1992/93-1995/96 1/

Crop and State	Indicated				Indicated			
	1992/93	1993/94	1994/95	1995/96	1992/93	1993/94	1994/95	1995/96
	-- 1,000 boxes 2/--				-- 1,000 short tons--			
All oranges	255,760	240,450	268,505	270,300	10,992	10,329	11,616	11,659
Arizona	1,850	1,900	1,050	1,100	69	71	39	42
California	66,800	63,600	61,000	66,000	2,505	2,385	2,289	2,475
Florida	186,600	174,400	205,400	202,000	8,396	7,849	9,244	9,090
Texas	510	550	1,055	1,200	22	24	44	52
All grapefruit	68,375	65,100	71,050	68,400	2,791	2,661	2,912	2,809
Arizona	2,150	1,750	1,400	1,200	69	59	47	40
California	9,200	9,300	9,300	8,500	303	311	312	285
Florida	55,150	51,050	55,700	54,000	2,344	2,171	2,367	2,296
Texas	1,875	3,000	4,650	4,700	75	120	186	188
All lemons	24,800	25,900	24,100	27,500	942	984	916	1,045
Arizona	4,400	5,200	3,600	5,500	167	197	137	209
California	20,400	20,700	20,500	22,000	775	787	779	836
Limes:								
Florida	1,000	200	230	300	44	9	10	13
Tangelos:								
Florida	3,050	3,350	3,150	2,500	137	150	142	113
All tangerines	5,850	7,400	6,400	7,350	247	318	275	317
Arizona	950	1,000	650	950	35	37	25	36
California	2,100	2,300	2,200	2,300	79	86	82	86
Florida	2,800	4,100	3,550	4,100	133	195	168	195
Temples:								
Florida	2,500	2,250	2,550	2,200	113	101	114	99
K-early citrus:								
Florida	185	210	120	100	8	9	5	5
U.S. total citrus					15,274	14,561	15,990	16,060

1/ The crop year begins with bloom of the first year shown and ends with harvest.

2/ Net pounds per box: oranges-California and Arizona-75; Florida-90; Texas-85; grapefruit-California desert and Arizona-64 prior to 1993/94, 67 in 1993/94; California other areas-67; Florida-85; Texas-80; lemons-76; limes-88; tangerines-California and Arizona-75; Florida-95; tangelos, temples, and K-early-90.

Source: National Agricultural Statistics Service, USDA.



Table 5--Citrus fruit: Season-average equivalent on-tree returns received by growers, by State, variety, and use, 1992/93-1994/95

Variety and State	Fresh			Processing			All		
	1992/93	1993/94	1994/95	1992/93	1993/94	1994/95	1992/93	1993/94	1994/95
--Dollars per box 2/--									
<b>ORANGES:</b>									
Florida	3.81	5.98	4.86	3.46	3.98	3.24	3.48	4.09	3.32
Early and midseason	4.50	6.75	4.75	3.15	3.56	2.51	3.23	3.76	2.64
Valencia	2.54	4.25	5.05	3.95	4.63	4.25	3.88	4.61	4.29
California	7.80	8.14	8.62	-2.05	-1.97	-2.45	5.19	5.36	5.45
Navel and miscellaneous	6.80	8.19	8.37	-2.14	-1.80	-2.33	4.53	6.14	5.77
Valencia	9.79	8.05	9.02	-1.89	-2.09	-2.56	6.44	4.29	5.01
Arizona	4.52	6.36	5.60	-2.38	-2.00	-2.22	3.20	4.66	5.19
Navel and miscellaneous	7.40	8.39	9.37	-2.17	-2.11	-2.18	5.77	6.35	8.02
Valencia	2.69	5.15	3.52	-2.48	-1.94	-2.56	1.63	3.67	3.45
Texas	6.94	8.38	4.02	1.10	1.74	2.18	6.23	7.82	3.43
Early and midseason	7.08	8.70	3.73	1.11	1.77	2.17	6.28	8.08	3.19
Valencia	6.01	6.26	5.90	0.56	1.19	2.40	5.83	6.04	5.60
United States 1/	6.92	7.67	7.69	3.03	3.48	2.84	3.88	4.40	3.75
Early, midseason, and navel	6.36	7.90	7.48	2.73	3.24	2.22	3.56	4.31	3.26
Valencia	7.99	7.28	8.04	3.50	3.84	3.68	4.39	4.52	4.43
<b>GRAPEFRUIT:</b>									
Florida	4.86	5.52	4.52	1.06	0.71	-0.54	2.66	2.83	1.48
Seedless	4.86	5.52	4.52	1.01	0.66	-0.62	2.68	2.85	1.48
Seeded	4/	4/	4/	1.88	1.78	1.45	1.88	1.78	1.45
Texas	6.57	5.02	3.18	0.85	1.02	0.54	5.11	3.89	2.36
California	6.35	6.74	7.47	-2.13	-1.59	-1.78	3.11	3.86	4.10
Arizona	3.38	2.97	4.63	-1.78	-1.75	-1.79	1.61	1.30	4.23
United States 1/	5.10	5.63	4.84	0.77	0.50	-0.59	2.75	2.97	1.86
<b>LEMONS:</b>									
California	14.91	16.39	16.09	-1.58	-2.46	-2.78	6.42	6.19	7.33
Arizona	9.31	12.44	11.34	-1.55	-2.17	-2.52	4.90	6.12	6.77
United States	13.74	15.45	15.23	-1.58	-2.41	-2.75	6.15	6.18	7.24
<b>TANGERINES:</b>									
Florida	18.30	13.30	15.80	0.97	0.54	-1.34	13.75	9.83	11.51
California	15.39	14.05	18.22	-2.59	-2.14	-2.35	9.95	9.12	11.68
Arizona	15.19	11.95	16.12	-2.59	-2.36	-2.28	10.55	9.20	14.20
United States 1/	16.95	13.32	16.50	-0.76	-0.52	-1.75	12.08	9.56	11.80
<b>TANGELOS:</b>									
Florida	5.60	6.10	5.15	1.57	0.57	-0.72	3.31	2.38	1.34
<b>TEMPLES:</b>									
Florida	4.40	4.55	5.10	2.13	1.75	1.40	2.99	2.73	2.54
<b>LIMES:</b>									
Florida	2.20	17.40	11.10	-2.18	-1.39	-3.00	1.02	12.70	8.65

1/ U.S. average price is weighted by the size of the container. 2/ Net content of box varies. Approximated average are as follows: oranges-California and Arizona, 75 lbs.; Florida, 90 lbs.; Texas, 85 lbs.; grapefruit-California, Desert Valleys and Arizona, 64 lbs.; other California areas, 67 lbs.; Florida, 85 lbs.; Texas, 80 lbs.; lemons, 76 lbs.; tangelos and temples, 90 lbs.; tangerines-California and Arizona, 75 lbs.; Florida, 95 lbs.; and limes-Florida, 88 lbs.

3/ Sales insignificant due to December 1989 freeze damage. 4/ Fresh sales insignificant and included in processed.

Source: National Agricultural Statistics Service, USDA.

Table 6--Citrus fruit: Season-average equivalent P.H.D. returns received by growers; by State, variety, and use 1992/93-1994/95 1/

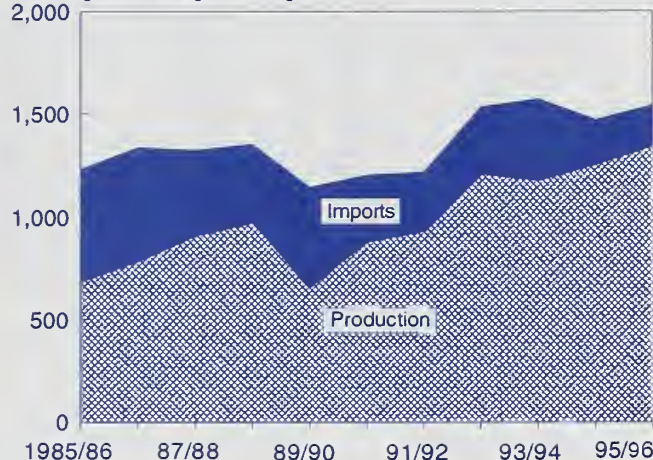
Variety and State	Fresh			Processing			All		
	1992/93	1993/94	1994/95	1992/93	1993/94	1994/95	1992/93	1993/94	1994/95
--Dollars per box 3/--									
ORANGES:									
Florida	5.71	7.88	6.81	5.36	5.98	5.24	5.38	6.08	5.32
Early and midseason	6.40	8.65	6.70	5.05	5.56	4.51	5.13	5.76	4.63
Valencia	4.44	6.15	7.00	5.85	6.63	6.25	5.78	6.61	6.28
California	9.67	10.04	10.69	-0.16	-0.02	-0.38	7.07	7.27	7.51
Navel and miscellaneous	8.59	10.02	10.42	-0.35	0.03	-0.28	6.32	7.97	7.82
Valencia	11.83	10.08	11.10	0.15	-0.06	-0.48	8.48	6.32	7.09
Arizona	6.46	8.31	7.66	-0.42	-0.04	-0.18	5.15	6.61	7.25
Navel and miscellaneous	9.19	10.22	11.42	-0.38	-0.28	-0.13	7.56	8.18	10.06
Valencia	4.73	7.18	5.60	-0.44	0.09	-0.48	3.67	5.70	5.52
Texas	8.86	9.70	5.18	3.00	3.00	3.29	8.15	9.14	4.58
Early and midseason	9.00	10.02	4.89	3.01	3.04	3.28	8.20	9.40	4.33
Valencia	7.93	7.58	7.06	2.46	2.46	3.51	7.75	7.36	6.76
United States 2/ Early, midseason, and navel	8.80	9.57	9.72	4.93	5.48	4.85	5.77	6.37	5.76
Valencia	8.17	9.74	9.49	4.62	5.23	4.22	5.44	6.27	5.26
Valencia	10.00	9.28	10.09	5.41	5.84	5.68	6.32	6.53	6.44
GRAPEFRUIT:									
Florida	6.46	7.37	6.78	2.73	2.89	2.19	4.29	4.86	4.02
Seedless	6.46	7.37	6.78	2.68	2.87	2.15	4.32	4.89	4.04
Seeded	5/	5/	5/	3.48	3.43	3.25	3.48	3.43	3.25
Texas	8.33	6.22	4.18	2.55	2.17	1.49	6.86	5.08	3.34
California	8.15	8.32	9.05	-0.33	-0.01	-0.20	4.91	5.44	5.68
Arizona	5.00	4.55	6.21	-0.16	-0.17	-0.21	3.23	2.88	5.81
United States 2/	6.74	7.39	6.85	2.45	2.60	1.99	4.40	4.91	4.18
LEMONS:									
California	18.43	20.20	19.90	1.94	1.35	1.03	9.94	10.00	11.14
Arizona	12.83	16.00	14.90	1.97	1.39	1.04	8.42	9.68	10.33
United States	17.26	19.20	19.00	1.94	1.36	1.03	9.67	9.94	11.02
TANGERINES:									
Florida	20.90	16.60	19.10	3.97	5.04	3.16	16.46	13.46	15.11
California	17.43	16.08	20.30	-0.55	-0.11	-0.27	11.99	11.15	13.76
Arizona	17.23	13.98	18.20	-0.55	-0.33	-0.20	12.59	11.23	16.27
United States 2/	19.30	16.12	19.33	1.77	3.03	1.77	14.48	12.57	14.81
TANGELOS:									
Florida	7.50	8.55	7.60	3.62	3.97	2.68	5.29	5.47	4.41
TEMPLES:									
Florida	6.30	6.55	7.10	4.18	5.15	4.80	4.98	5.64	5.51
LIMES:									
Florida	8.00	23.40	17.10	2.62	3.61	2.00	6.55	18.46	14.47

1/ P.H.D.--Packinghouse-door. 2/ U.S. average price is weighted by the size of the container. 3/ Net content of box varies. Approximated averages are as follows: oranges-California and Arizona, 75 lbs.; Florida, 90 lbs.; Texas 85 lbs.; grapefruit-California, Desert Valleys and Arizona, 64 lbs.; other California areas, 67 lbs.; Florida, 85 lbs.; Texas, 80 lbs.; lemons, 76 lbs.; tangelos and temples, 90 lbs.; tangerines-California and Arizona, 75 lbs.; Florida, 95 lbs; and limes-Florida, 88 lbs. 4/ Sales insignificant due to December 1989 freeze damage. 5/ Fresh sales insignificant and included in processed.

Source: National Agricultural Statistics Service, USDA.

Figure 1  
**Orange juice: production and imports**

Million gallons single-strength  
2,000



growth. While the number of bearing trees increased almost 9 percent for the 1995/96 season, all varieties set less fruit per tree resulting in slightly lower expected production. USDA reports the new crop fruit to be in very good to excellent condition, contributing to excellent crop prospects.

USDA forecasts total U.S. orange juice production to be a record 1.3 billion gallons (single-strength equivalent) in 1995/96. This year's forecast is up 3 percent from a year ago. The smaller Florida orange crop is expected to be offset by higher juice yields, which are forecast at 1.54 gallons (42 degrees Brix) per box, and larger quantities of California and Arizona oranges available for processing. This forecast assumes Florida processes 94 percent of its orange crop and California and Arizona process 23

percent of the Western navel crop and 34 percent of the Valencia crop.

U.S. exports are forecast to reach a record high of 135 billion gallons but remain at about 10 percent of production as they have over the last few years. The 6-percent increase in 1995/96 from last year is largely attributed to expected reduced availability of Brazilian orange juice in the world market. While Brazil's orange production is expected to be up for 1995/96, the quantity of fruit processed is expected to be lower, leaving more fruit available for Brazilians to consume fresh. Fewer oranges for processing, along with lower juice yields from this year's crop, are expected to reduce Brazil's orange juice output.

The quantity of U.S. orange juice exports rose 10 percent from December 1994-August 1995 over the same period last year. Exports rose to Canada, South America, and Europe, but fell to Japan.

U.S. imports of orange juice in 1995/96 are expected to be up 10 percent from this season's low level because of tighter beginning stocks and reduced output of Valencia oranges. Imports from Brazil will continue low again this year. The U.S. orange juice industry, however, needs Brazilian orange juice to blend with early varieties of domestic oranges to get the preferred juice color and taste.

Imports during December 1994-August 1995 were down 46 percent from the previous year. Shipments from Brazil were down 57 percent during this period, and stopped entering the United States in the spring.

Orange juice prices fell at both the grower and retail level in 1994/95 from a year earlier. Higher exports, along with tighter beginning stocks and the lower Florida Valencia orange crop, are expected to cause prices to increase this coming year.

Table 7--Estimated utilization of round oranges, Florida, 1988/89-1995/96 1/

Item	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94	1994/95	Forecast 1995/96
--Million boxes 90-lb--								
Fresh	7.7	5.2	11.4	10.3	9.4	8.6	8.9	9.0
Frozen concentrate	107.4	70.1	100.4	90.6	128.3	111.7	140.8	134.7
Chilled juice 2/	29.5	33.5	38.2	37.0	47.2	51.0	53.4	56.0
Canned juice	1.1	0.6	0.6	0.5	0.3	0.2	0.3	0.3
Blends	4/	4/	4/	4/	4/	4/	4/	4/
Non-certified	0.9	0.8	1.0	1.4	1.3	1.3	1.5	1.5
	--	--	--	--	--	1.4	0.5	0.5
Total	146.6	110.2	151.6	139.8	186.5	174.2	205.4	202.0

-- = Not applicable.

1/ The total used in processed products does not agree exactly with the utilization reported by the Florida Citrus Processors Association orange utilization report, which includes some specialty fruit. 2/ Prior to 1993/94, chilled juice category includes utilization by nonmember of the Florida Citrus Processors Association. 3/ Includes utilization by nonmembers of the Florida Citrus Processors Association. 4/ Less than 50,000 boxes.

Source: Florida Department of Citrus.



Table 8--United States: Orange juice supply and utilization, 1986/87-1995/96f

Season 1/	Beginning stocks	Production	Imports	Supply	Exports	Domestic consumption	Ending stocks 2/
Million SSE gallons 3/							
1986/87	204	781	557	1,542	73	1,267	201
1987/88	201	907	416	1,524	90	1,223	212
1988/89	212	970	383	1,564	73	1,258	233
1989/90	233	652	492	1,377	90	1,062	225
1990/91	225	876	327	1,429	96	1,174	158
1991/92	158	930	286	1,374	108	1,097	168
1992/93	168	1,207	326	1,701	114	1,340	247
1993/94	247	1,118	400	1,765	107	1,388	269
1994/95	269	1,251	200	1,720	127	1,361	232
1995/96 f	232	1,282	220	1,734	135	1,369	230

1/ Season begins in December of the first year shown. 2/ Data may not add due to rounding. 3/ SEE = single-strength equivalent.

Source: Economic Research Service and Foreign Agricultural Service, USDA.

Table 9--Monthly prices for processed oranges and frozen concentrated orange juice, 1991/92-94/95

Month	Processed oranges 1/				Near-term futures contract 2/				Retail frozen concentrate 3/			
	1991/92	1992/93	1993/94	1994/95	1991/92	1992/93	1993/94	1994/95	1991/92	1992/93	1993/94	1994/95
--\$ per 90-lb box--												
December	4.90	3.20	3.10	2.45	1.640	0.945	1.067	1.094	1.739	1.700	1.672	1.549
January	5.35	3.15	3.80	2.90	1.508	0.792	1.099	1.048	1.879	1.677	1.674	1.583
February	5.70	3.05	4.10	3.10	1.417	0.703	1.059	1.032	1.963	1.753	1.648	1.609
March	6.25	3.50	4.12	3.70	1.414	0.816	1.094	1.011	1.922	1.619	1.665	1.629
April	6.65	4.05	5.05	4.40	1.333	0.937	1.032	1.058	1.976	1.627	1.662	1.632
May	7.00	4.05	5.35	4.80	1.329	1.046	0.954	1.046	1.959	1.572	1.600	1.632
June	7.40	3.95	5.05	4.50	1.289	1.144	0.925	1.012	1.933	1.587	1.598	1.620
July	--	--	--	--	1.189	1.211	0.916	0.936	1.929	1.558	1.640	1.639
August	--	--	--	--	1.136	1.181	0.943	1.084	1.906	1.610	1.578	1.642
September	--	--	--	--	1.141	1.253	0.909	1.122	1.877	1.626	1.594	1.607
October	--	--	--	--	0.988	1.261	1.004	1.155	1.830	1.615	1.574	
November	3.00	2.45	2.15		0.951	1.055	1.104		1.774	1.643	1.550	
Simple Average 4/	5.96	3.49	4.13	3.50	1.278	1.029	1.009	1.054	1.891	1.632	1.621	1.614

-- = Not applicable.

1/ Equivalent on-tree price received by growers, Florida. One box contained 6.56 pounds of orange juice solids in 1992/93, 6.52 pounds in 1993/94, and 6.23 pounds in 1994/95. 2/ Average of Friday closing prices. 3/ 16 fluid ounces of 42 degrees Brix product contain 0.52 pounds of orange juice solids. 4/ 1994/95 average calculated available months. Average processed orange price is calculated November/June.

Sources: National Agricultural Statistics Service, USDA; New York Cotton Exchange; Bureau of Labor Statistics, U.S. Department of Labor.

Table 10--U.S. monthly stocks of frozen concentrated orange juice, 1991/92-1994/95

Month	Florida				Other U.S.				Total			
	1991/92	1992/93	1993/94	1994/95	1991/92	1992/93	1993/94	1994/95	1991/92	1992/93	1993/94	1994/95
--Million gallons (single strength equivalent)--												
December	249	262	298	449	28	59	31	43	276	321	329	492
January	351	348	395	541	30	41	35	47	381	389	430	588
February	347	443	462	555	32	40	35	50	380	484	497	605
March	337	430	451	593	35	41	32	48	372	471	483	641
April	386	470	492	640	38	42	40	52	424	512	532	692
May	399	497	550	626	42	39	49	50	441	536	598	676
June	351	476	530	569	46	39	39	45	397	514	569	614
July	290	406	458	501	45	33	36	38	335	439	494	539
August	245	351	383	402	51	31	37	35	296	382	421	437
September	203	298	349	329	49	28	33	32	252	326	382	361
October	175	264	314		43	25	32		218	289	346	
November	125	216	237		42	31	33		168	247	269	

Sources: Florida Citrus Processors Association; and National Agricultural Statistics Service, USDA.

## Higher California Navel and Valencia Orange Production Expected for 1995/96

The California orange crop, which provided about 80 percent of the total U.S. fresh supply over the last 3 years, is expected up in 1995/96. Navel orange production is expected to total 1.43 million tons in 1995/96, up from 1.31 million tons the previous year. If realized, the crop would be 9 percent above last year's and 4 percent above 1992/93's production level. The new navel crop was reported to be maturing well with a set similar to last year but with larger fruit. Harvesting in California began in the latter part of October, about 2 weeks behind average. The California Valencia orange crop is expected larger than each of the past 3 years. The new crop is estimated to be almost 1.1 million tons, 8 percent above last year and 4 percent above 1993/94.

Figure 2  
California orange production, use, and on-tree price

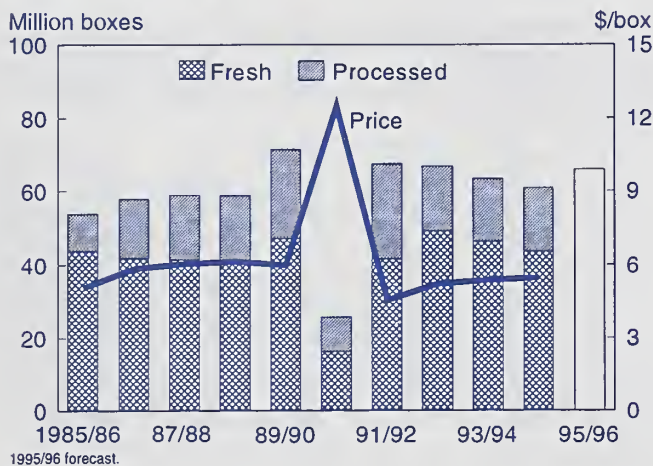


Table 11--Oranges: Supply and utilization, 1986/87-1995/96

Season 1/	Supply		Utilization		
	Production	Fresh imports	Processed	Fresh exports	Fresh consumption
-- 1,000 short tons --					
1986/87	7,889	22	5,731	584	1,596
1987/88	8,712	25	6,569	465	1,703
1988/89	9,117	9	7,062	559	1,505
1989/90	7,873	13	5,763	576	1,547
1990/91	7,961	69	6,704	257	1,068
1991/92	9,015	17	6,837	546	1,649
1992/93	11,105	11	8,663	613	1,840
1993/94	10,430	18	8,086	603	1,759
1994/95	11,730	19	9,373	656	1,720
1995/96f	11,758	17	9,379	672	1,724

f=forecast

1/ Marketing season begins in November of the first year shown. Includes temples.

Sources: Economic Research Service and Foreign Agricultural Service, USDA.

Fresh orange shipments were up 8 percent in November 1994-August 1995 from the previous year, reaching a record 656,000 short tons. Exports were up to the European Union (EU) and Asia, but slightly down to Canada. U.S. orange exports are expected to continue up in 1995/96. The opening of markets throughout Asia could help set record exports for fresh oranges, forecast at 672,000 tons.

California grower fresh orange prices (on-tree season average) in 1994/95, at \$8.23 per 75-pound box, were down slightly from 1993/94's average of \$8.36. Despite higher output, prices for 1995/96 are expected to be up in response to strong export demand.

## Grapefruit Crop Expected Down Slightly From Last Year's Record Crop

The U.S. grapefruit crop reached record levels at 2.9 million tons in 1994/95. Production exceeded 1993/94 by 9 percent and 1992/93 by 4 percent. Only the Arizona crop declined, as it had the preceding 2 years.

Figure 3  
U.S. grapefruit production, use, and on-tree price

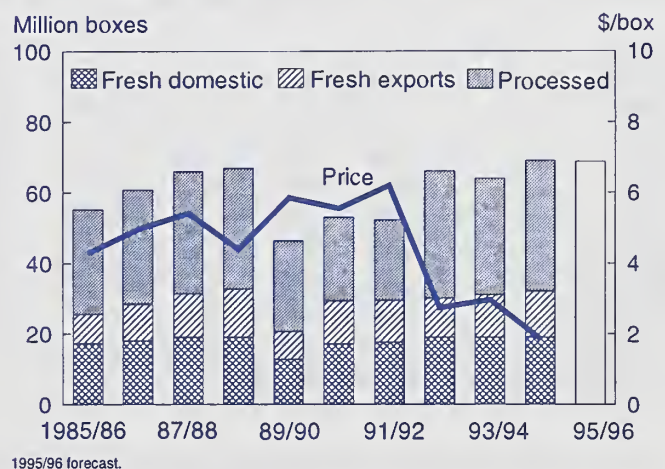


Table 12--Grapefruit: Supply and utilization, 1986/87-1995/96

Season 1/	Supply		Utilization		
	Production	Fresh imports	Processed	Fresh exports	Fresh consumption
-- 1,000 short tons --					
1986/87	2,586	2	1,386	436	766
1987/88	2,801	6	1,469	523	815
1988/89	2,844	4	1,449	587	812
1989/90	1,978	5	1,096	337	550
1990/91	2,256	8	1,015	513	736
1991/92	2,224	12	975	506	755
1992/93	2,791	14	1,518	486	801
1993/94	2,661	16	1,383	506	788
1994/95	2,912	14	1,587	536	803
1995/96f	2,809	13	1,492	551	766

f=forecast

1/ Marketing season begins in September of the first year shown.

Sources: Economic Research Service and Foreign Agricultural Service, USDA.



Table 13--Oranges: Utilized production, United States, 1992/93-1995/96 1/

Crop and State	Indicated				Indicated			
	1992/93	1993/94	1994/95	1995/96	1992/93	1993/94	1994/95	1995/96
	--1,000 boxes 2/--				--1,000 short tons--			
Early, midseason, and navels 3/:								
Arizona	159,250	145,080	156,050	161,500	6,831	6,248	6,755	6,977
California	700	700	400	500	26	26	15	19
Florida	43,800	36,600	35,000	38,000	1,642	1,372	1,313	1,425
Texas	114,300	107,300	119,700	122,000	5,143	4,829	5,387	5,490
Texas	450	480	950	1,000	20	21	40	43
Valencias:								
Arizona	96,510	95,370	112,455	108,800	4,161	4,081	4,861	4,682
California	1,150	1,200	650	600	43	45	24	23
Florida	23,000	27,000	26,000	28,000	863	1,013	976	1,050
Florida	72,300	67,100	85,700	80,000	3,253	3,020	3,857	3,600
Texas	60	70	105	200	2	3	4	9

1/ The crop year begins with bloom of the first year shown and ends with harvest.

2/ Net pounds per box: oranges-California and Arizona-75; Florida-90; and Texas-85.

3/ Navel and miscellaneous varieties in California and Arizona. Early and midseason varieties in Florida and Texas, including small quantities of tangerines in Texas.

Source: National Agricultural Statistics Service, USDA.

Table 14--Oranges: Average monthly equivalent on-tree prices received by growers, California, 1992-95

Month	Fresh oranges				Processing oranges				All oranges			
	1992	1993	1994	1995	1992	1993	1994	1995	1992	1993	1994	1995
	--Dollars per 75-lb box--											
January	11.53	6.60	6.29	8.47	0.04	-2.17	-2.11	-2.11	9.68	4.82	4.85	6.75
February	7.93	6.09	6.31	7.60	0.04	-2.17	-1.65	-2.29	6.35	4.01	4.69	4.98
March	6.84	5.86	8.33	6.99	-0.14	-2.19	-1.47	-2.41	5.07	3.55	5.88	4.37
April	7.09	6.93	8.77	9.17	-0.54	-2.25	-1.88	-2.50	4.57	4.12	5.97	6.06
May	7.56	6.82	9.51	9.63	-0.62	-2.16	-1.99	-2.55	4.40	4.22	6.70	6.80
June	5.89	6.81	8.45	9.62	-0.68	-2.09	-2.09	-2.56	2.86	4.32	5.61	5.97
July	5.18	7.99	7.45	8.92	-0.91	-1.73	-2.09	-2.56	1.87	5.07	4.09	6.05
August	4.88	11.19	8.15	9.02	-1.33	-1.53	-2.09	-2.56	1.02	7.25	4.24	4.25
September	4.88	4.88	7.65	8.72	-1.53	-1.53	-2.09	-2.54	1.05	1.05	3.44	7.21
October	6.68	5.76	6.49	7.52	-1.59	-1.54	-2.09	-2.52	2.41	1.80	1.81	6.83
November	8.25	11.21	9.96		-1.82	-1.69	-2.20		5.51	8.48	6.50	
December	7.50	8.39	8.87		-2.17	-2.19	-2.11		5.90	7.02	6.67	

Source: National Agricultural Statistics Service, USDA.

Table 15--Oranges: Average monthly equivalent on-tree prices received by growers, Florida, 1992-95

Month	Fresh oranges				Processing oranges				All oranges			
	1992	1993	1994	1995	1992	1993	1994	1995	1992	1993	1994	1995
	--Dollars per 90-lb box--											
January	6.90	2.55	3.45	3.85	5.35	3.15	3.61	2.80	5.40	3.13	3.61	2.83
February	7.17	2.80	3.15	4.84	5.70	3.05	3.74	3.05	5.86	3.04	3.72	3.13
March	6.10	1.80	3.93	4.95	6.25	3.50	4.00	4.00	6.24	3.38	3.99	4.04
April	6.10	2.20	3.85	4.75	6.65	4.05	4.59	4.40	6.62	3.98	4.57	4.41
May	7.10	2.90	3.85	5.15	7.00	4.05	4.75	4.60	7.00	4.01	4.72	4.62
June	10.60	5.10	5.75	5.85	7.40	3.95	4.77	4.30	7.66	4.00	4.82	4.36
July	--	--	--	--	--	--	--	--	--	--	--	--
August	--	--	--	--	--	--	--	--	--	--	--	--
September	--	--	--	--	--	--	--	--	--	--	--	--
October	--	--	6.45	--	--	--	1.40	--	--	--	3.04	--
November	5.70	9.45	4.45		3.00	3.03	1.95		3.56	4.83	2.12	
December	4.80	6.05	4.65		3.20	3.38	2.45		3.33	3.58	2.59	

-- = Insufficient marketing to establish price.

Source: National Agricultural Statistics Service, USDA.



Table 16--Grapefruit: Utilized production, United States, 1992/93-1995/96 1/

Indicated					Indicated			
Crop and State	1992/93	1993/94	1994/95	1995/96	1992/93	1993/94	1994/95	1995/96
	--1,000 boxes 2/--				--1,000 short tons--			
Florida	55,150	51,050	55,700	54,000	2,344	2,171	2,367	2,296
Seedless	53,400	50,000	54,400	53,000	2,270	2,126	2,312	2,253
Colored	27,700	25,500	28,700	29,000	1,177	1,084	1,220	1,233
White	25,700	24,500	25,700	24,000	1,093	1,042	1,092	1,020
Other	1,750	1,050	1,300	1,000	74	45	55	43
Arizona	2,150	1,750	1,400	1,200	69	59	47	40
California	9,200	9,300	9,300	8,500	303	311	312	285
Desert Valley 3/	3,500	3,400	3,300	2,550	112	114	111	86
Other areas 3/	5,700	5,900	6,000	5,950	191	197	201	199
Texas	1,875	3,000	4,650	4,700	75	120	186	188

1/ The crop year begins with bloom of the first year shown and ends with harvest.

2/ Net pounds per box: California desert and Arizona-64 prior to 1993/94, 67 beginning 1993/94; California other areas-67; Florida-85; and Texas-80.

3/ Indicated 1995/96 based on average production during three previous seasons. California Desert and Other Area grapefruit forecasts combined to All grapefruit beginning in 1995/96.

Source: National Agricultural Statistics Service, USDA.

Table 17--Estimated utilization of Florida grapefruit, 1990/91-1995/96

Table 17--Estimated utilization of Florida grapefruit, 1990/91-1995/96						Forecast
Item	1990/91	1991/92	1992/93	1993/94	1994/95	1995/96
	-- Million 85-lb boxes --					
Fresh	23.2	21.9	22.1	21.5	21.2	23.0
Canned	0.8	0.6	0.5	0.3	0.3	0.3
Frozen concentrate	17.4	16.1	26.6	22.3	27.3	23.4
Chilled juice	2.1	2.4	4.5	5.7	5.6	6.0
Blends 1/	0.8	0.4	0.4	0.3	0.2	0.2
Non-certified	0.8	1.0	1.1	1.0	1.1	1.1
Total	45.1	42.4	55.2	51.1	55.7	54.0

1/ Includes utilization by non-members of the Florida Citrus Processors Association.

Source: Florida Department of Citrus.

Table 18--Grapefruit: Average monthly equivalent on-tree prices received by growers, Florida, 1992-95

Month	Fresh grapefruit				Processing grapefruit				All grapefruit			
	1992	1993	1994	1995	1992	1993	1994	1995	1992	1993	1994	1995
	-- Dollars per 85-lb box--											
January	7.96	4.06	4.99	4.39	4.20	1.39	0.50	-0.71	6.04	2.77	2.92	1.44
February	9.04	4.68	5.16	4.69	4.51	1.06	0.82	-0.11	6.22	2.66	2.59	1.34
March	9.92	4.09	5.68	4.23	4.65	1.04	1.01	-0.13	7.23	1.81	2.43	1.03
April	10.07	4.58	4.95	3.36	4.93	1.01	0.82	-0.86	8.14	2.10	2.10	0.55
May	--	3.21	1.99	2.75	--	0.97	0.37	-1.81	--	1.60	0.96	0.22
June	--	3.00	2.10	--	--	0.55	-0.47	--	--	1.50	1.09	--
July	--	--	--	--	--	--	--	--	--	--	--	--
August	--	--	--	--	--	--	--	--	--	--	--	--
September	--	--	8.65	--	--	--	-2.31	--	--	--	7.20	--
October	7.41	9.47	6.89	6.37	0.81	-0.34	-1.91	-1.28	6.28	7.43	4.37	4.84
November	5.38	6.20	3.69	--	1.17	-0.30	-1.64	--	4.24	4.49	1.73	--
December	5.28	5.17	3.38	--	1.38	0.01	-1.25	--	3.78	3.30	1.22	--

-- = Insufficient marketing to establish price.

Source: National Agricultural Statistics Service, USDA.

Grapefruit production in 1995/96 is expected to total 2.8 million short tons, a 4-percent decline from last year's record. The 1995/96 crop, however, would be 6 percent higher than the 1993/94 crop. Production of both white seedless and seedy grapefruit is expected to be down, but production of colored seedless varieties is expected up from last year. If the forecast for colored grapefruit is realized, it will be a record. Florida's crop, which accounts for 82 percent of U.S. grapefruit production, is down about 3 percent to 2.3 million tons. The decline is attributed to smaller-sized grapefruit and lighter fruit set than last year. California's crop is expected to decline 9 percent to 285,000 tons and Arizona's crop will be down 15 percent to 40,000 tons. Texas' crop, however, is expected to increase by 1 percent this year to 188,000 tons.

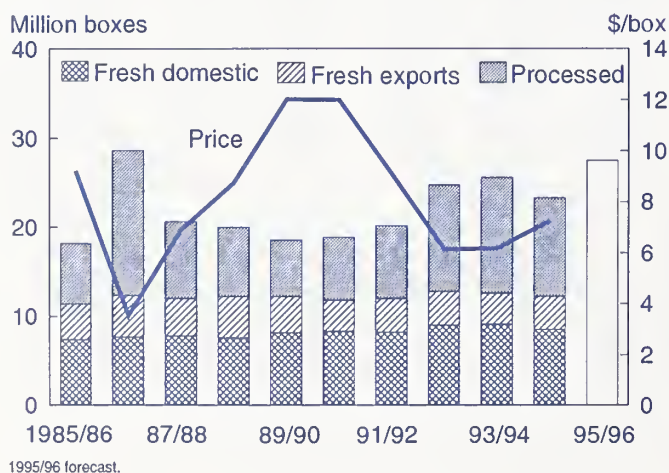
Grapefruit exports were up 6 percent in 1994/95 from the previous year. From September through August, 536,000 short tons of grapefruit were exported, slightly less than the record of 564,000 tons set a few years ago. Exports were up to the EU, Latin America, and most of Asia, but declined slightly to Japan. In 1995/96, exports are expected to continue to increase. The reported good quality of the fruit is expected to boost U.S. total grapefruit exports to 551,000 tons.

With the record high production, grapefruit prices fell in 1994/95 from the previous year. In 1995/96, slightly lower production along with higher demand, both domestic and export, should boost grower prices, but still lower than the early nineties.

### Lemon Crop Forecast Up

USDA expects the 1995/96 lemon crop to be up 14 percent to 1.045 million tons. California's production is projected to be 7 percent above last year at 836,000 tons. With the season underway since August, the crop's quality is rated good. Arizona's crop is up 53 percent from last year at 209,000 tons.

Figure 4  
U.S. lemon production, use,  
and on-tree price



1995/96 forecast.

Table 19--Lemons, fresh: Supply and utilization, 1984/85-94/95

Year 1/	Fresh-market			Consumption	
	production	Imports	Exports	Total	Per capita
	-- Million pounds --			Pounds	
1984/85	881.6	10.5	346.4	545.7	2.30
1985/86	865.6	32.3	306.0	591.9	2.47
1986/87	938.2	21.5	360.3	599.4	2.48
1987/88	916.2	12.2	326.4	602.7	2.47
1988/89	933.3	12.9	358.4	587.7	2.39
1989/90	932.1	23.2	308.6	646.6	2.60
1990/91	896.8	25.5	268.3	654.0	2.60
1991/92	915.6	20.3	291.4	644.5	2.54
1992/93	951.0	16.1	285.8	681.3	2.65
1993/94	946.3	16.7	268.0	695.0	2.68
1994/95	1017.9	23.8	286.4	755.3	2.88

1/ Season beginning August.

Source: Economic Research Service, USDA.

Table 20--Fresh lemons: Average monthly equivalent on-tree prices received by grower, United States, 1991-95

Month	1991	1992	1993	1994	1995
--Dollars per 76-lb box--					
January	24.65	10.19	8.58	5.29	8.81
February	18.74	9.95	8.55	3.95	8.03
March	18.44	11.55	10.09	6.48	8.35
April	22.10	13.58	12.03	1.037	11.59
May	25.40	13.85	15.11	13.29	16.09
June	24.30	15.15	24.71	20.79	25.29
July	30.60	15.65	25.71	28.19	30.09
August	29.15	16.47	31.33	33.09	32.34
September	30.60	17.39	31.78	28.88	26.60
October	25.52	11.11	21.83	15.58	21.52
November	19.67	5.51	11.33	10.67	
December	9.48	7.61	7.31	9.21	

Source: National Agricultural Statistics Service, USDA.

Continued low prices accompanying the larger 1995/96 crop should keep boosting domestic and export demand. The large 1994/95 output of lemons pushed season-average prices down from 1993/94 levels. Domestic per capita consumption rose to 2.88 pounds in response to the lower prices.

## Noncitrus Fruit Outlook

### U.S. Apple Production Declines But Remains Large in 1995

Reduced apple production in Washington and California brought the final USDA forecast for the 1995 U.S. apple crop to 11.1 billion pounds, down 2 percent from 1994's record crop. Despite the decline, U.S. apple production remains relatively large compared with previous years. A generally cold, wet, and windy spring in Washington resulted in poor pollination and fruit set. In addition, some severe hail in early July in the northern growing areas of Washington and lack of warm weather during the bloom pe-



riod, led to an overall reduction in fruit size. Washington's apple harvest is expected to total 5.2 billion pounds, down nearly 9 percent from a year ago, with decreases in Red Delicious, Golden Delicious, and Rome varieties. Some California orchards were affected by similar weather conditions, bringing their crop forecast down 5 percent from a year ago to 1.0 billion pounds.

Relatively favorable growing conditions in the Central and Eastern States resulted in larger 1995 apple crops in these States. Michigan is expected to harvest another record-breaking crop totaling 1.2 billion pounds, up 20 percent from 1994. According to the Michigan Processing Apple

Growers Committee, moisture was adequate over most of lower Michigan, and growers only faced minor hail and scab problems. Meanwhile, New York's crop is forecast at 1.1 billion pounds, up only fractionally from 1994, due to a very dry summer in most of the western growing areas. Fruit quality was good, but the harvest generally consisted of smaller-sized apples, particularly in the nonirrigated orchards. Pennsylvania's crop is expected to reach 500 million pounds, up 25 percent from a year ago.

The decline in U.S. apple production in 1995, along with high quality fruits, and the prospects of continued strong domestic and export demand have supported apple prices. Grower prices for fresh apples averaged 33 percent above last year's September-October average. At retail markets, prices for Red Delicious apples in September averaged 6 percent higher than last September.

The demand for juice apples from the smaller 1995 crop is expected to be strong partly due to higher prices for imported apple juice concentrate, according to the International Apple Institute. The Michigan Apple Growers Marketing Committee established a minimum juice-apple price of 5.6 cents a pound (\$112/ton) for the 1995/96 season, up from 4 cents a pound in 1994/95. As of October 18, most Michigan processors were paying a price equal to the minimum juice-apple price of 5.6 cents a pound for straight loads of juice apples. This price was up 24 percent from a year earlier. The Washington juice-apple price on October 18 was 8.5 cents a pound (\$170/ton), almost 3 cents higher than the Michigan minimum juice-apple price, and more than 3 times higher than last year's price. The industry expects processed use to increase 1 percent in 1995 and juice processing to increase 5 percent.

Exports of U.S. fresh apples outpaced the prior year (August-July) by 10 percent, with Hong Kong, Taiwan, Thailand, and the EU and South American countries (especially Brazil) accounting for most of the gain. The prospects for U.S. apple exports in 1995/96 remain strong due partly to the weak U.S. dollar, a smaller European crop, and continued export opportunities to Asia and Latin America.

Brazilian officials agreed on August 24 to temporarily waive new phytosanitary regulations (announced in March 1995) which would foreclose export opportunities for U.S. apples, pears, and table grapes this fall. They agreed to waive these requirements through December 31, after receiving an official request for a reprieve from the United States. Efforts by American and Brazilian plant quarantine officials are underway to try and reach agreement on new requirements which address Brazil's legitimate concerns while providing U.S. exporters continued access. U.S. fresh apple exports to Brazil during October 1994 through June 1995 increased more than 13 times the October 1993-June 1994 volume.

### Smaller Pear Crop Boosts Prices

USDA's final forecast of U.S. pear production in 1995 was 1.93 billion pounds, down 8 percent from the prior year. Most major pear-producing States posted smaller crops, ex-

Table 21--Noncitrus fruit production, 1991-94 and indicated 1995

Crop and state	1991	1992	1993	1994	1995
-- Million pounds --					
Apples	9,707	9,708	9,709	9,710	9,711
Washington	4,300	4,650	5,000	5,700	5,200
Michigan	880	1,080	1,020	1,020	1,220
New York	1,050	1,170	870	1,100	1,110
California	800	840	880	1,050	1,000
Pennsylvania	470	500	530	400	500
Other states	2,207	2,329	2,385	2,066	2,106
Pears:					
Bartlett	1,060	1,118	1,028	1,180	1,020
California	600	630	576	666	530
Oregon	140	148	126	166	140
Washington	320	340	326	348	350
Other-than-Bartlett	746	728	869	912	907
California	34	46	40	60	60
Oregon	300	280	320	350	320
Washington	352	334	440	436	460
Other states	60	68	69	66	67
All pears	1,806	1,846	1,897	2,092	1,927
California	634	676	616	726	590
Oregon	440	428	446	516	460
Washington	672	674	766	784	810
Other states	60	68	69	66	67
Grapes	11,112	12,104	12,046	11,741	11,553
California	9,960	10,920	10,766	10,506	10,180
Table type	1,240	1,290	1,264	1,204	1,280
Wine type	4,390	4,290	4,794	4,530	4,400
Raisin type	4,330	5,340	4,708	4,772	4,500
Other states	1,152	1,184	1,280	1,235	1,373
Peaches	2,396	2,672	2,660	2,507	2,493
Clingstone	1,030	1,183	1,097	1,130	940
Freestone	1,666	1,489	1,563	1,377	1,553
California	627	642	603	632	540
South Carolina	310	190	220	250	255
Georgia	150	130	150	175	160
New Jersey	115	85	90	75	97
Pennsylvania	100	90	100	2/	90
Other states	364	352	400	245	411
Strawberries 1/	1,366	1,335	1,391	1,566	1,454
California	1,097	1,032	1,142	1,305	1,204
Florida	132	162	162	168	168
Other states	137	141	86	93	83

1/ Estimates for 1995 carried forward from earlier forecasts.

2/ No significant production due to frost.

Source: National Agricultural Statistics Service, USDA.



Table 22--U.S. monthly grower prices for noncitrus fruit, 1993-95

Month	Apples			Pears		
	1993	1994	1995	1993	1994	1995
--Cents/pound--						
January	18.3	18.7	19.5	18.5	11.8	11.1
February	16.7	17.8	18.3	20.9	11.0	14.4
March	14.5	16.6	18.2	20.6	10.1	17.3
April	14.3	15.5	16.6	21.5	9.1	18.7
May	14.9	14.3	15.5	25.3	8.6	17.7
June	16.1	13.5	15.6	26.9	8.8	17.0
July	17.8	19.4	16.8	19.5	7.4	17.7
August	24.4	29.0	23.7	17.2	8.5	15.2
September	24.1	20.8	27.1	18.3	13.9	18.7
October	21.1	19.2	26.1	17.5	12.4	17.2
November	19.3	16.4		16.5	13.6	
December	18.6	19.2		14.1	12.7	

	Peaches			Strawberries		
	1993	1994	1995	1993	1994	1995
--Cents/pound--						
January	--	--	--	90.7	79.5	123.0
February	--	--	--	88.5	71.9	83.8
March	--	--	--	58.4	67.9	68.0
April	--	--	--	43.8	56.7	54.6
May	28.8	19.3	38.8	38.3	56.4	66.9
June	22.0	13.8	26.5	46.1	52.3	53.1
July	19.1	17.7	18.5	32.8	49.5	50.7
August	19.0	17.6	27.4	46.9	49.0	63.3
September	22.6	23.9	32.9	48.9	46.6	41.5
October	--	--	--	64.2	82.4	44.0
November	--	--	--	95.7	89.9	
December	--	--	--	141.0	129.0	

-- = Insufficient marketing to establish price.

Sources: National Agricultural Statistics Service and Economic Research Service, USDA.

cept for Michigan, Pennsylvania, and Washington. California and Oregon crops, the second and third largest, were down 19 percent and 11 percent, respectively.

Production of Bartlett pears in 1995 decreased 14 percent from a year ago. Bartlett pears are mostly canned while the other varieties are consumed fresh. In California, poor pollination due to excessive moisture in the spring and some hail damage to the fruit contributed to a 20-percent reduction in Bartlett output. Oregon's Bartlett output was 16 percent smaller, while Washington's was up fractionally. Production of other-than-Bartlett varieties was down less than 1 percent from a year ago, reflecting Oregon's smaller output. Production of other-than-Bartlett varieties in California remained unchanged from last year, while in Washington it was up 6 percent.

According to the California Pear Advisory Board, fresh use and processing use of Bartlett pears were down 28 percent and 24 percent respectively, from a year ago. Fresh use accounted for 26 percent of the harvested tonnage in 1995, while processing use accounted for 74 percent.

Tighter domestic supplies of pears in 1995/96 will help boost grower prices for fresh market pears. July-October 1995 grower prices averaged 63 percent higher than the same period in 1994. Large stocks of Bartlett pears in cold storage as of the end of August 1995 has dampened prices of processing pears. The 1995 canning-pear price in California averaged about 10.15 cents a pound (\$203/ton, average of Class I-IV pears), 6 percent below a year ago. In Washington and Oregon, the canning-pear price was 8.25 cents a pound (\$165/ton), 21 percent lower than last year.

### **Unfavorable Weather Contributed To Smaller Grape Output in 1995**

U.S. grape production in 1995 is expected to total 11.6 billion pounds, down 2 percent from last year, reflecting smaller crops in California, New York, Pennsylvania, and Arizona. Larger crops are expected in Washington, Michigan, Oregon, Ohio, Arkansas, Georgia, and North Carolina, given generally favorable growing conditions. California's production was affected by floods during March in vineyards in Napa and Sonoma counties, a mid-June hail storm in Fresno County, and cool temperatures as well as mildew and sunburn problems in the Central Valley. Pennsylvania's output was also affected by cold temperatures and mildew problems while New York's output suffered somewhat from inadequate rainfall.

The top three U.S. grape production States in 1995 are California, Washington, and New York, providing 96 percent of the U.S. grape crop. California is expected to provide 88 percent of the 1995 crop. California's overall grape production, expected at 10.2 billion pounds, will be down 3 percent from a year ago, with raisin-type and wine-type grape output 6 percent and 3 percent smaller, respectively, and table-type grapes 6 percent larger and of good quality.

Washington's grape crop is expected to increase sharply to 616 million pounds, up 37 percent from a year ago, and representing 5 percent of the U.S. grape crop. New York's output is forecast to decline 8 percent from a year ago, and accounts for 3 percent of the U.S. total. Michigan and Pennsylvania are expected to rank as the fourth and fifth largest grape-producing States, with 144 million pounds and 140 million pounds, respectively. Michigan's crop will be up 11 percent from a year ago, while Pennsylvania's crop is expected to decline 13 percent.

### **Peach Prices Average Higher Than a Year Ago**

The final 1995 U.S. peach crop forecast was 2.49 billion pounds, down fractionally from the year before, with production declines in California and Georgia. A stormy spring and hail storms in May and June contributed to the smaller crop in California. In Georgia, production was down despite favorable growing conditions throughout the season, partly reflecting the alternate-bearing nature of the trees.

Total peach production consists of Clingstone and Free-stone varieties, with California producing nearly all of the Clingstone output. Total peach production in California is

expected to equal 59 percent of the U.S. peach crop in 1995, down 16 percent from a year earlier. California's Clingstone crop amounted to 940 million pounds, 17 percent below a year ago while the U.S. Freestone crop totaled 1.55 billion pounds, 13 percent larger than in 1994. More Freestone peaches from South Carolina, New Jersey, and minor peach-producing States was enough to offset 15 percent and 9 percent reductions in California and Georgia, respectively.

Smaller Freestone peach crops in California and Georgia helped boost peach prices. Grower prices averaged 56 percent above last year's May-September average. Retail prices for fresh peaches averaged 12 percent higher than last year's June-August average.

With lower processing supplies this year, processors also paid higher prices for canning peaches. According to the California Canning Peach Association, the 1995 peach deliveries to processors were completed in September, with the total tonnage 22 percent below last year. The offgrade percent remained low, but was slightly higher than in 1994, while the projected paid-for tonnage was lower than last year. The sliding scale agreed to by growers and canners resulted in a price of 10.65 cents a pound (\$213 per ton), 15 percent higher than a year ago. Cannery prices were lower in 1994 when the sliding scale of 9.25-10.90 cents a pound, combined with higher paid-for tonnage, obligated canners to pay 9.25 cents (\$185 per ton).

### ***Strawberry Production Declines***

USDA's July forecast for the 1995 U.S. strawberry crop was 14.5 million cwt, down 7 percent from last year. The spring crop was pegged at 12.9 million cwt, down 8 percent from 1994, with reduced production in California, Oregon, and Washington. The Florida crop, which produces most of the winter strawberries, was pegged at 1.68 million cwt, almost unchanged from a year ago. Lower yields in Florida, relative to a year ago, were nearly offset by a 3-percent increase in area harvested.

California growers harvested a larger production area in 1995, but yields were 9 percent below last year. As a result, California's spring crop, accounting for 94 percent of the U.S. spring crop, totaled 12.0 million cwt, down 8 percent from 1994. Excessive rains in March destroyed some fields in the major-producing areas of Monterey and Santa Cruz counties and delayed harvest in other areas. Earlier in the year, heavy rains also disrupted strawberry shipments from southern areas.

Oregon and Washington's 1995 spring crop declined 15 percent and 13 percent, respectively, from the prior year, reflecting lower yields and smaller area harvested. Although Oregon's harvest peaked in mid-June, some rot damage resulting from rains during the second-half of June became a problem for later pickings. Wet conditions in some production areas in Washington also caused some losses due to mold. Generally fair growing conditions contributed to good crops in Michigan and New Jersey. Michigan's crop

amounted to 108,000 cwt, up 9 percent from a year ago, and New Jersey's crop totaled 20,000 cwt, up 43 percent.

Both fresh and processed uses in 1995 declined from a year ago as a result of reduced production. According to the Processing Strawberry Advisory Board of California, fresh use from January through October 14 was down 10 percent from the same period a year ago. Deliveries of grade-1 berries to processors from April 1 through October 7 were 319 million pounds, down 7 percent from the same period last year, and juice deliveries declined 13 percent to nearly 71 million pounds. Deliveries to processors through the remainder of 1995 will continue to decline as the season ends, and the 1995 total is expected to remain below a year ago.

The smaller 1995 crop strengthened fresh strawberry prices. Grower prices for fresh strawberries in January through October averaged 6 percent higher than during the same period in 1994. Consumers also paid higher prices for fresh strawberries. From February through September, retail prices for fresh strawberries averaged 18 percent higher than during the same period last year. Meanwhile, higher prices for fresh strawberries and lower production decreased strawberry processing this year. Typically, this scenario would lead to higher processing prices. Ample stocks of frozen strawberries from last year's large crop, however, have resulted in a relatively sluggish demand for processing strawberries this year leading to lower prices instead. Field prices for grade-1 freezer berries and grade-2 berries (juice berries) averaged slightly lower than last year's 29.2 cents and 9.2 cents a pound, respectively, according to the California Processing Strawberry Board.

U.S. strawberry exports are expected to decline from a year ago in 1995, due partly to the smaller U.S. crop, some quality problems, a rebound in fresh strawberry production, and large carry-in stocks of frozen strawberries in Poland, the world's fourth largest producer, and the devaluation of the Mexican peso. Thus far, U.S. strawberry exports are 7 percent below 1994's January-July total. U.S. fresh strawberry exports declined 13 percent from a year ago, while U.S. frozen strawberry exports rose 10 percent.

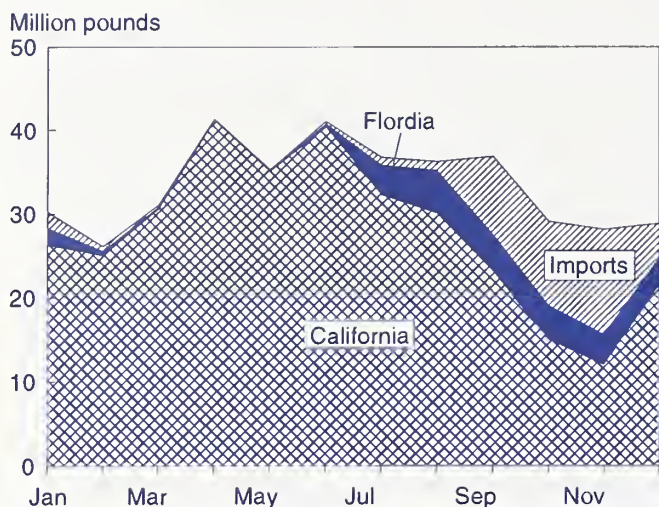
With lower domestic production, U.S. fresh and frozen strawberry imports are expected to increase in 1995, with Mexico continuing as the major foreign supplier. U.S. strawberry (fresh and frozen) imports were already 50 percent above last year's January-July import volume.

### ***California Avocado Output To Increase***

Given favorable growing conditions, California's avocado harvest in 1995/96 is expected to be about 10 to 20 percent larger than the 1994/95 crop, according to the California Avocado Commission. If realized, the output will be the highest since 1992/93's bumper crop of 568 million pounds. Harvest usually begins in November and continues to the end of October. Year-over-year fluctuations in the avocado crop are attributed to weather factors and the alternate-bearing tendency of avocado trees.



Figure 5  
U.S. avocado shipments



The 1994/95 California avocado crop totaled 300 million pounds, 8 percent larger than the prior year's crop, but not much more than half of the record 568-million-pound crop in 1992/93. Yields were about 8 percent higher than last year, partly reflecting above-average fruit weights due to some delayed harvesting caused by heavy rains earlier in the year. California's avocado area also increased fractionally to 72,600 bearing acres in 1994/95, from 72,500 acres in 1993/94. The varietal distribution of the 1994/95 crop consisted of 83 percent Haas varieties, 3 percent Fuerte, and 14 percent other varieties.

Monthly shipments were running below a year ago in 1995, but moved up beginning in April. Shipments are usually the heaviest between March and August. Total shipments from April through August were nearly 30 percent above the same period a year ago. Season shipments through September totaled 244 million pounds.

Avocado production in Florida for the 1995/96 (June-March) marketing season is expected to be slightly larger

Table 23--U.S. avocado shipments, 1989-95

Source	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
-- Million pounds --													
Florida 1/:													
1989	3.41	0.98	0.06	0.00	0.00	0.25	7.25	11.74	11.61	11.25	9.46	7.83	63.85
1990	3.72	1.66	0.21	0.00	0.00	0.65	5.77	7.87	5.44	7.78	5.04	3.52	41.66
1991	1.14	0.34	0.02	0.00	0.01	1.19	8.77	10.22	9.04	8.74	6.85	6.16	52.49
1992	3.58	0.75	0.19	0.00	0.00	0.26	6.40	7.08	N.A.	N.A.	N.A.	N.A.	18.25
1993	N.A.	N.A.	N.A.	0.00	0.00	N.A.	0.15	1.20	1.70	1.58	1.52	1.67	7.82
1994	0.45	0.28	0.18	0.00	0.00	0.46	4.17	7.04	7.04	6.58	5.65	4.63	36.49
1995	2.56	0.80	0.02	0.00	N.A.	N.A.	4.36	7.63	5.53				
California 1/:													
1989	22.87	25.41	33.74	29.74	33.75	30.57	24.66	26.55	17.04	13.02	12.96	16.65	286.96
1990	19.25	16.32	16.29	16.74	23.21	17.20	14.64	16.38	8.10	6.10	8.00	16.94	179.14
1991	19.08	19.14	17.09	19.91	29.78	22.71	27.45	22.91	15.57	9.91	3.48	10.64	217.65
1992	27.47	21.80	24.10	39.23	33.12	31.56	30.88	20.67	16.49	9.30	9.04	28.81	292.48
1993	29.68	33.06	40.86	62.66	50.06	62.80	46.18	45.81	41.84	30.50	22.65	21.64	487.73
1994	21.96	20.21	26.93	21.95	22.20	26.87	19.74	23.75	11.12	5.17	4.29	14.43	218.61
1995	16.82	19.10	22.53	30.58	28.48	26.33	34.28	28.87	17.85				
Imports:													
1989	0.45	0.00	0.00	0.02	0.05	0.05	0.30	0.19	0.44	2.97	4.22	1.65	10.35
1990	1.19	0.18	0.15	0.00	0.02	0.37	0.60	1.98	6.21	9.41	7.17	2.22	29.49
1991	1.67	0.97	0.01	0.07	0.03	0.10	0.34	0.33	2.41	14.62	8.27	8.77	37.58
1992	2.36	0.95	0.20	0.14	0.15	0.26	0.72	0.74	13.12	16.20	15.42	2.97	53.23
1993	1.18	0.31	0.14	0.12	0.21	0.26	0.86	1.11	1.94	2.94	4.70	4.37	18.14
1994	2.07	0.44	0.22	0.15	0.18	0.58	1.25	1.43	12.99	11.02	17.55	4.89	52.76
1995	2.96	1.10	0.03	0.10	0.56	0.84	0.78						
Total:													
1989	26.74	26.39	33.80	29.76	33.80	30.87	32.21	38.48	29.09	27.25	26.64	26.13	361.16
1990	24.16	18.15	16.64	16.74	23.24	18.23	21.00	26.22	19.75	23.29	20.21	22.68	250.30
1991	21.89	20.45	17.12	19.99	29.81	24.00	36.56	33.46	27.01	33.26	18.59	25.57	307.72
1992	33.41	23.50	24.49	39.38	33.28	32.08	38.00	28.49	29.60	25.50	24.46	31.78	363.97
1993	30.85	33.37	41.00	62.78	50.27	63.05	47.19	48.12	45.48	35.03	28.88	27.68	513.70
1994	24.49	20.93	27.32	22.11	22.38	27.92	25.16	32.22	31.15	22.77	27.49	23.94	307.86
1995	22.33	21.00	22.58	30.67	29.04	27.17	39.42	36.51					

N.A.= Not available.

1/ Includes exports.

Sources: California and Florida Avocado Administrative Committees and Bureau of the Census, U.S. Department of Commerce.



USDA's proposal to allow fresh Mexican Haas avocados into 19 Northeast States was opposed by the California Avocado Commission (CAC). The CAC represents about 6,200 avocado growers in California. The proposal was published in the Federal Register on July 3, 1995. Requirements of the proposed rule include pest surveys, cultural practices, compliance to special packing, inspection, and shipping procedures, and import restrictions on destination and period of shipments. According to the proposal, Mexican Haas avocado shipments would be allowed into the Northeastern States only during late fall and early winter months to reduce the chances of pest survival. Public hearings were held across the United States during the month of August. During the last two hearings held in Escondido, California, August 30-31, over 1,500 domestic growers expressed their opposition to USDA's proposal. A written comment period ended October 16, 1995, and a final determination is still pending.

USDA's Animal and Plant Health Inspection officials believe that the requirements under the proposed rule will be effective in preventing the introduction of fruit pests into the United States. A majority of the hearing participants, however, felt strongly that California's avocado industry would still be vulnerable to problems associated with pests introduced from Mexico if the proposal is accepted. Lack of border inspectors and the problems associated with transshipment as soon as the fruits enter the country were some of the issues raised. U.S. fresh avocado imports from Mexico, the world's largest producer, have been prohibited since 1914 to protect U.S. growing areas from pests that could be carried with the Mexican shipments. As of July 1993, Mexican shipments were allowed only into Alaska.

than the 1994/95 crop. NASS estimates commercial shipments in 1995/96 to total 40 million pounds. Commercial shipments represent the State's production, excluding those that are for local fresh use. Commercial shipments from June through September were estimated at 18 million pounds, 45 percent of the total forecast for commercial shipments, and heavier shipments are expected from October through January.

Florida's 1994/95 avocado crop (40 million pounds) was more than 4 times the 1993/94 crop and the largest in 2 years. Trees that survived Hurricane Andrew in 1992 produced an abundant, good quality crop this year. While the bearing acreage fell 2 percent below a year ago, yields were more than 4 times higher than last year. The large crop caused the average packinghouse-door price to drop 25 percent from the prior year. The value of Florida's avocado crop totaled \$12.3 million, more than double the value of last year's crop.

U.S. avocado imports from November 1994 through July 1995 were more than double the volume during the November 1993-July 1994 period, with Chile continuing as the main supplier. U.S. avocado exports from November 1994 through July 1995 increased 75 percent from November 1993-July 1994, with the European Union, Canada, and Japan as the top export markets. With the larger crop expected in 1995/96, U.S. avocado imports for the coming marketing season are likely to decline from this year, while U.S. avocado exports will likely continue strong.

### ***Cranberry Processing Prices To Average Slightly Higher in 1995***

USDA's August forecast of U.S. cranberry production was 4.71 million barrels, up only 1 percent from 1994, but a record. Production is expected to increase only slightly due to decreased production in all cranberry-producing States except Wisconsin. According to the Cranberry Marketing Committee, however, recent indications point to lower output in all the cranberry-producing States compared with the August forecast. Hence, total U.S. cranberry production in 1995 could be lower than a year ago.

A drought in August hampered crop development in Massachusetts. Oregon's crop suffered hail damage to blooms in late-March and April resulting in poor pollination and be-

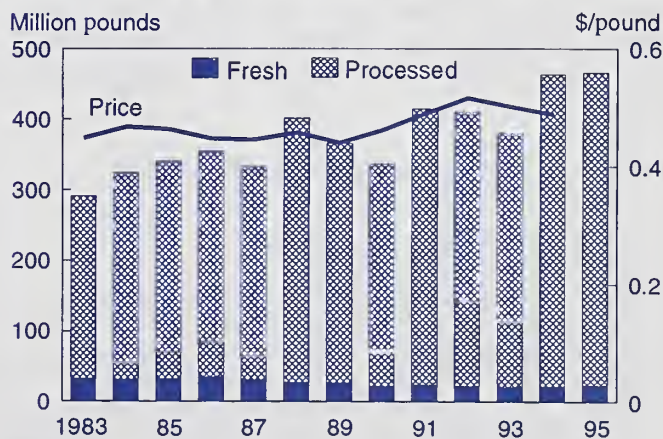
Table 24--Cranberry production, 1991-95

States	1991	1992	1993	1994	1995
--Million pounds--					
Massachusetts	197.6	188.7	188.0	195.2	195.0
New Jersey	32.7	47.8	38.6	55.8	52.0
Oregon	20.3	28.8	15.6	33.0	26.0
Washington	15.8	15.7	13.7	20.2	18.3
Wisconsin	155.5	135.0	136.0	164.0	179.4
United States	421.9	416.0	391.9	468.2	470.7

Source: National Agricultural Statistics Service, USDA.

Figure 6

### **U.S. cranberry utilization and season-average grower price**



1995 forecast.

low average fruit set. A very wet spring in Washington caused some delayed blooms and some small fruit. The northern growing areas of Wisconsin appear to be having a good crop, but the central growing areas, where most of the cranberries are produced, suffered from excessive heat in June and July.

Massachusetts continues to lead in cranberry production, providing about 41 percent of the U.S. output in 1995. Based on USDA's August forecast, Massachusetts is expected to produce 1.95 million barrels, down fractionally from a year ago, but 4 percent larger than its 1993 crop. Harvest began around mid-September and was about 98 percent complete in late-October. In spite of problems with very dry conditions earlier in the season, berry size was reported as medium and the berry quality and color were good.

The August forecast set Wisconsin's output at 1.79 million barrels, up 9 percent from the prior year, and a record. Increased production was partly due to expanded area. Harvest is usually complete by mid-October. Wisconsin is the second largest U.S. cranberry-producing State, providing over a third of the total output. New Jersey's crop is expected at 520,000 barrels, down 7 percent from 1994. Oregon expects a 21-percent decline in cranberry production, and Washington expects a 9-percent decline.

The average price growers receive for cranberries may be slightly higher in 1995, according to the Cranberry Marketing Committee. Processors and handlers usually negotiate a price before harvest. Contract prices were supported this year by increased demand for processing cranberries as the number of handlers and processors rose at a time when most cranberry-producing States were anticipating decreased production.

The bumper crop in 1994 lowered average grower prices by almost 3 percent. However, large cranberry supplies resulted in a 16-percent increase in the total value of U.S. cranberry production to \$228.4 million.

Both fresh and processed uses increased in 1994. Fresh use increased about 9 percent and accounted for 5 percent of production. Processing cranberry use was up 22 percent from last year. A 50-percent lower shrinkage (dehydration and berry breakdown after delivery to processors) aided in the increase in processing use, compared with the prior year.

## **Tree Nut Outlook**

### ***Pecan Production Climbs***

USDA's October forecast of the 1995 pecan crop is 248 million pounds (in-shell basis), up 25 percent from 1994's crop, but 32 percent below 1993's exceptionally large crop. Alabama, California, Georgia, Louisiana, New Mexico, Oklahoma, and Texas are expected to register production increases while Florida, Kansas, North Carolina, and South Carolina are expected to have smaller crops. Arkansas' pro-

duction is expected to remain the same as last year. Production of improved pecan varieties is forecast to rise 33 percent from a year ago, and output of native varieties and seedlings is expected up 24 percent.

Georgia, the leading U.S. pecan-producing State, is forecast to harvest 80 million pounds in 1995, up 23 percent from the prior year, but only equivalent to 53 percent of their bumper crop in 1993. Pecan trees, particularly in the central and southwest growing regions, suffered from inadequate moisture and extreme heat, resulting in relatively smaller nuts and premature nut droppage. Production in Texas and New Mexico, the second and third largest pecan-producing States, are also expected to increase sharply from last year, but also short of 1993 production levels. Pest problems in Texas and a late freeze in some growing areas of New Mexico have resulted in some damage.

In light of the 1993 bumper crop and the 1994 smaller crop, pecan ending stocks last year were reduced to a more typical level compared with the year before. Hence, reduced carryin stocks this year will likely keep pecan supplies unchanged to slightly lower than last year, and will help support grower prices. U.S. imports of pecan nuts will likely decrease from last year given the large U.S. crop and the prospects of reduced production in Mexico due to a severe drought. U.S. pecan imports come primarily from Mexico.

### ***Hazelnut Production Increases Sharply***

USDA's October forecast of U.S. hazelnut production in 1995 was 76 million pounds (in-shell basis), up sharply from last year's 42.2 million pounds, and the second largest crop since the record 82 million pounds in 1993. Oregon's output is expected up 80 percent (75.8 million pounds) over its output a year ago, while Washington's crop is expected to remain unchanged. Although hazelnut trees tend to produce large crops during alternate years, favorable weather during most of the season also contributed to a larger crop. Good weather during the pollination period resulted in above-normal nut set. Last year's output was sharply reduced by hot, dry conditions. Despite lower carryin stocks, the large increase in the crop this year will likely put downward pressure on grower prices and reduce imports in 1995/96.

### ***Almond and Walnut Production Drops***

According to USDA's July forecast, the 1995 California almond crop is expected to decrease sharply from 1994's record harvest of 730 million pounds to an estimated 310 million pounds (shelled basis), the smallest crop since 1986's 250 million pounds. The sharp cut in production is attributed partly to unfavorable conditions during the winter and a very wet and windy spring. Large beginning stocks will moderate the shortage, but domestic supplies will be the smallest since 1986. Smaller supplies are expected to result in higher grower prices in 1995/96.

The September forecast of California's walnut production in 1995 was pegged at 440 million pounds (in-shell basis), down 10 percent from the July forecast and 5 percent be-



low 1994's crop. Yields are forecast to average 2,588 pounds per acre, down 5 percent from 1994, due partly to lighter average in-shell weights per nut. Walnut orchards were not affected by the winter and spring storms this year, but growers were faced with blight and sunburn problems. Continued strong exports, particularly to big markets such as Germany, Italy, Spain, and Japan, along with moderate beginning stocks and this year's smaller crop are expected to pressure grower prices up in 1995/96.

### ***Pistachio Prices Likely To Improve in 1995/96***

California harvested about 121 million pounds of pistachio nuts by the end of September 1995, about 90 percent of the expected crop, according to the California Pistachio Commission. Harvest is expected to be completed by October, with the final production total due by around mid-November. This crop could be slightly larger than last year be-

cause it is an "up year" in the trees' alternate bearing pattern. However, since the ending inventory in 1994/95 was 37 percent behind the prior year, tight supplies may continue and 1995/96 prices are not likely to drop below a year ago.

### ***Macadamia Nut Production and Prices Up in 1994/95***

Hawaii's macadamia nut production was estimated at 51.5 million pounds (in-shell) in 1994/95, up 6 percent from the prior year. Dry weather hampered production in orchards located in arid areas, but benefitted orchards situated in high rainfall areas. Bearing acreage held steady at 18,500 acres, but yields rose 6 percent from a year ago, as younger trees matured. Despite the increase in output, the season-average grower price in 1994/95 was 69 cents per pound (net, wet-in-shell), 1 cent above a year earlier, reflecting improved demand for macadamia nuts.

Table 25--Tree nuts: Production in principal States, 1990-94, and indicated 1995

Crop and State	1990	1991	1992	1993	1994	Indicated 1995
-- 1,000 pounds -- (shelled basis)						
Almonds:						
California	660,000	490,000	548,000	490,000	730,000	310,000
(in-shell basis)						
Hazelnuts:						
Oregon	43,000	50,600	55,000	81,600	42,000	75,800
Washington	400	400	400	400	200	200
2 States	43,400	51,000	55,400	82,000	42,200	76,000
Walnuts, English:						
California	454,000	518,000	406,000	520,000	464,000	440,000
Macadamia nuts:						
Hawaii	50,000	49,500	48,000	48,500	51,500	N.A.
Pistachios:						
California	120,000	77,000	147,000	152,000	129,000	N.A.
Pecans:						
Alabama	5,000	18,000	4,000	26,000	4,000	12,000
Arkansas	250	3,000	1,300	1,500	1,500	1,500
California	2,800	2,300	2,600	3,000	1,500	2,800
Florida	3,600	3,500	2,500	7,500	1,900	1,700
Georgia	65,000	100,000	30,000	150,000	65,000	80,000
Kansas 1/	N.A.	N.A.	N.A.	1,800	3,600	1,800
Louisiana	6,000	27,000	1,000	16,000	11,000	14,000
Mississippi	2,200	7,500	700	6,000	N.A.	2,500
New Mexico	34,000	29,000	30,000	36,000	24,000	30,000
North Carolina	400	5,500	2,500	2,500	5,000	2,700
Oklahoma	5,000	17,000	9,000	18,000	12,000	20,000
South Carolina	500	5,500	300	3,000	9,000	3,000
Texas	60,000	60,000	62,000	75,000	40,000	60,000
Other 2/	20,250	20,700	20,100	18,700	20,500	16,000
Total	205,000	299,000	166,000	365,000	199,000	248,000
Improved varieties 3/	143,500	163,300	104,800	237,100	118,900	158,100
Native and seedling	41,250	115,000	41,100	109,200	59,600	73,900

N.A. = Not available.

1/ Estimate published separately beginning 1993.

2/ Arizona, Kansas (until 1993), Missouri, and Tennessee, beginning with the 1989 crop, Mississippi during 1994. No breakdown between varieties available.

3/ Budded, grafted, or topworked varieties.

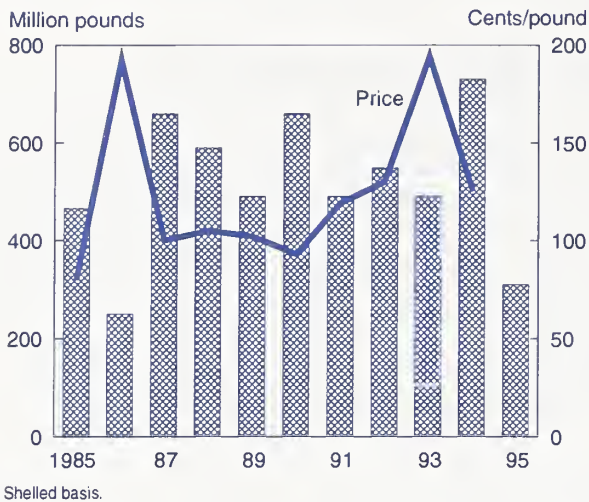
Source: National Agricultural Statistics Service, USDA.



Figure 7

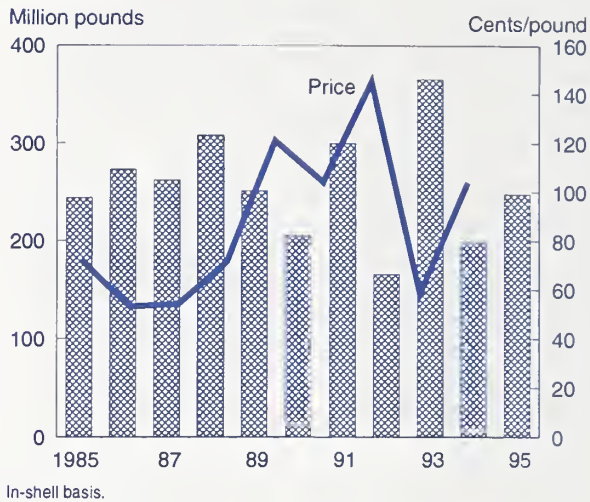
## Production and season-average price for tree nuts

### Almonds



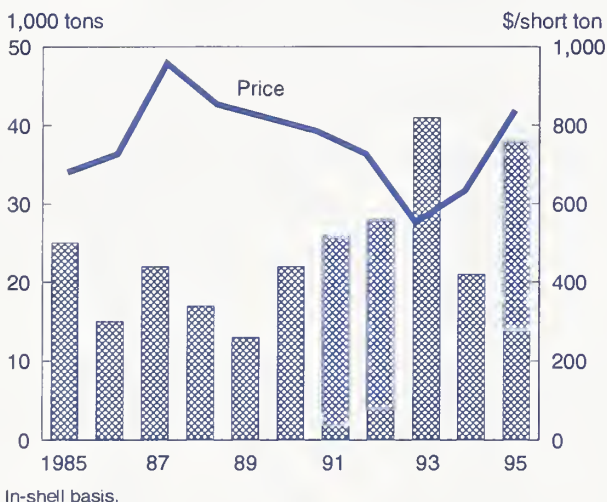
Shelled basis.

### Pecans



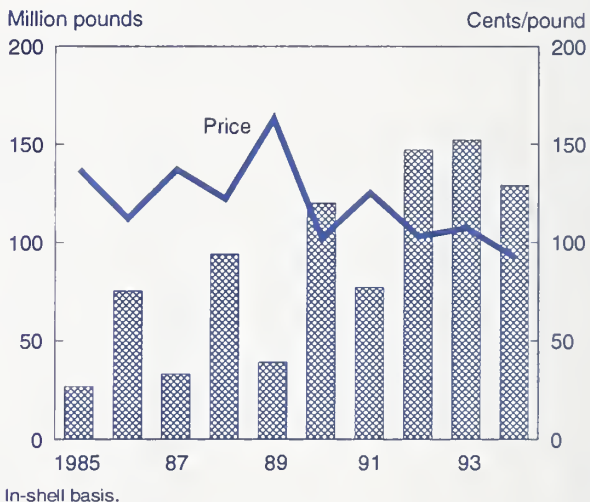
In-shell basis.

### Hazelnuts



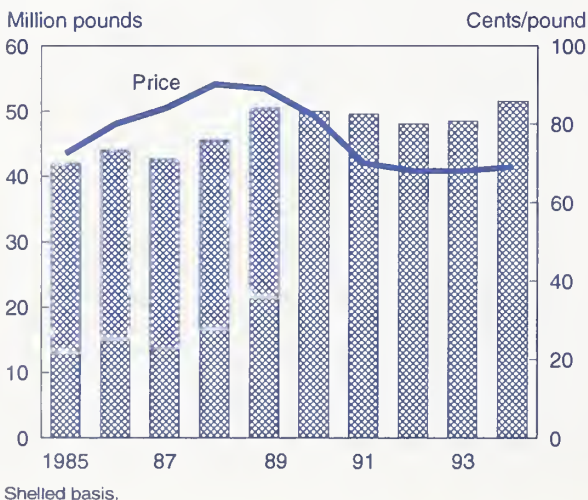
In-shell basis.

### Pistachios



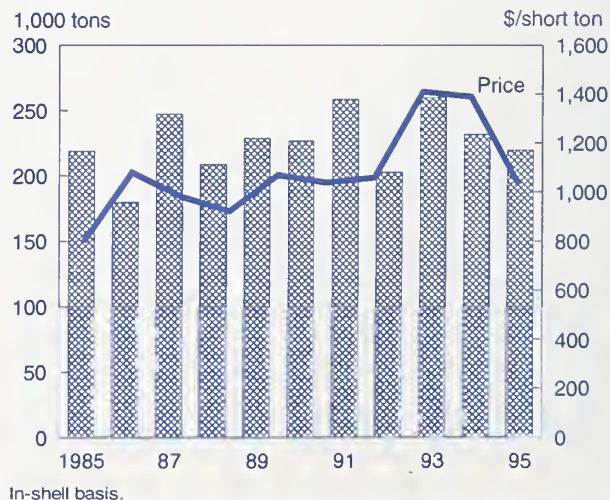
In-shell basis.

### Macadamia Nuts



Shelled basis.

### Walnuts



In-shell basis.

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